

FIG. 1

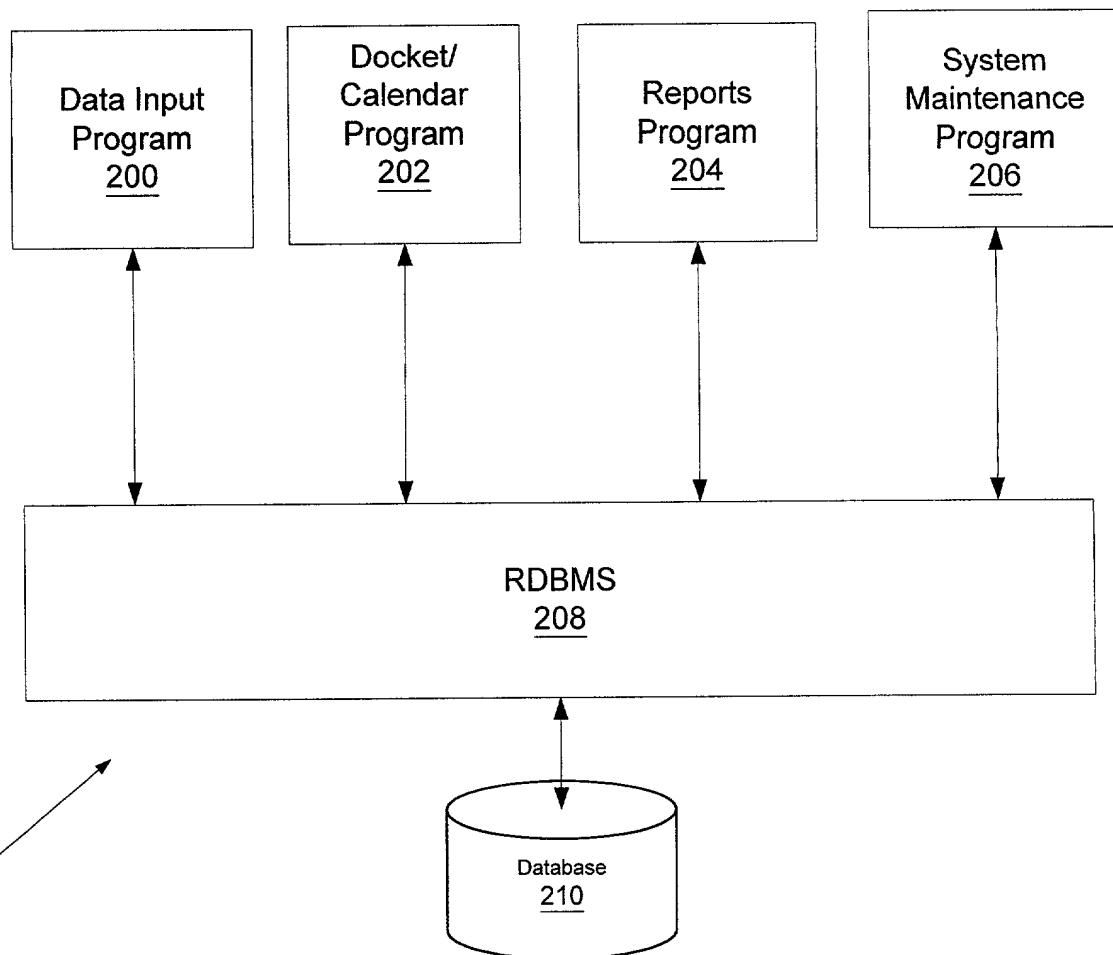


FIG. 2A

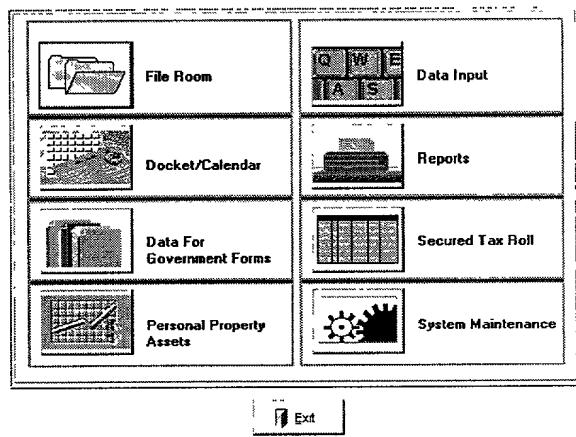
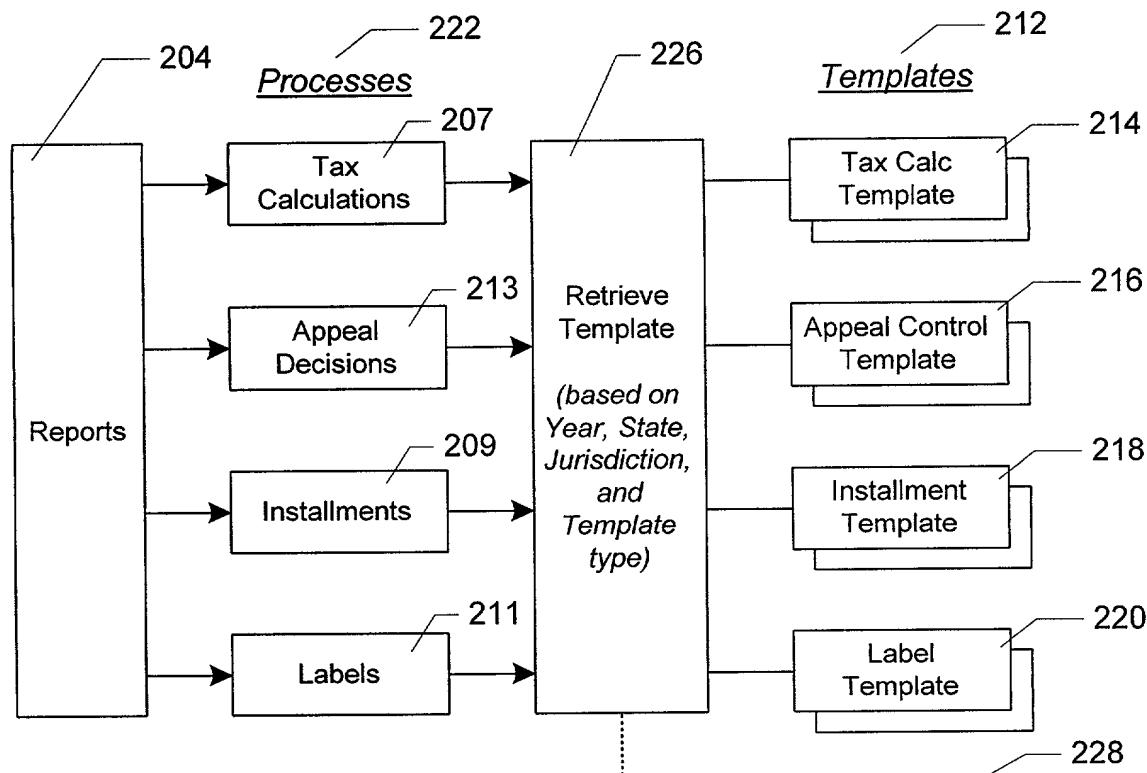


FIG. 2B Main Window



Select a type of template on first match of:

1. Year, State, Jurisdiction
2. Year, State, Parent Jurisdiction (keep moving up Jurisdiction chain)
3. Year, State
4. Year

FIG. 3

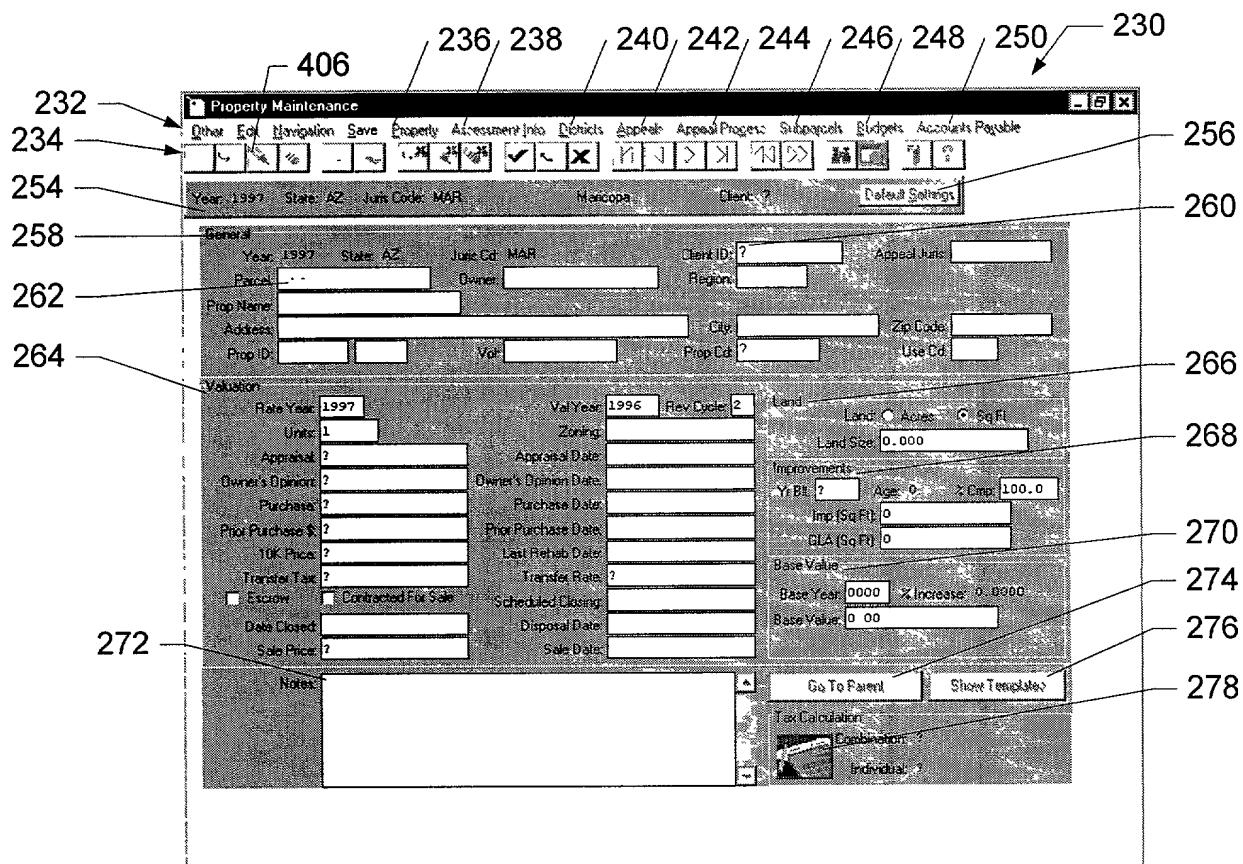


FIG. 4 Parcel Record

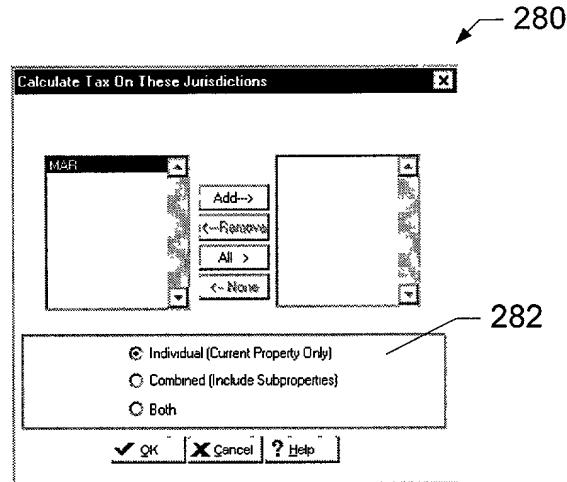


FIG. 5 Calculate Tax

Assessment Track

Type:  RE  PP  SUP  NAV

Track ID: 1  
Tax Bill#: N25  
Tax Bill Amt: 0.00

FCV Rate: 0.100000  
LPV Rate: 0.052680  
Eq. Ratio: 1.000000

descr:  Include Assessment

752

754

282

288

286

Assessment Detail

Subtype	FCV	Asd FCV	FCV Imp	FCV Land	Calc Tax Amount	Change Order:
Interim	500,000	720,000	400,000	500,000	109,329.60	<input type="button"/> Move Up <input type="button"/> Move Down
Projected values are marked with an asterisk (*)						
Subtype	Interim	Class: 5	<input type="checkbox"/> Projected?			
FCV	900,000	500,000	400,000	FCV Ratio:	80.000000	
Asd FCV	720,000	400,000	320,000	FCV Imp Ratio:	?	
LPV	900,000	Asd LPV	720,000	LPV Ratio:	80.000000	

FIG. 6 Assessments

Juris Cd

Juris Cd	Dist Code	Description
MAR	031600	Light Industrial

Taxing Jurisdictions: MAR

Dist Code: 031600  
Class: 8  
FCV Rate: 0.037028  
LPV Rate: 0.102171  
Rate Year: 1997

Special District  
Type:   
Amount: ?

292

290

FIG. 7 Districts

296 298 284 294

300

FIG. 8 Appeal Record

296 298 302

304

FIG. 9 Appeal Billing

306

Select a Track and/or Appeal:			
Type	Group	Prorata	ECA
A REAL	No	Yes	Garage Appeal
A Tracks Currently Under Appeal			

Level	Hearing	Tax Amount 1,000.00		Appeal Level 1		Hearing 1	
1	1	Calc. Tax Amount ?		Appeal #	3001	Class	5
				<input checked="" type="checkbox"/> File Appeal	<input type="checkbox"/> Outside Appeal		
				<input type="checkbox"/> Litigation	<input type="checkbox"/> Skip Level		
Requested	Actual Value	Land	Improvements	Date	Time		
Requested FCV: 9,000	90,000	20,000	70,000	Filing Deadline: 12/01/97	12:00 PM		
Requested Ass FCV: 900	90,000	20,000	70,000	Date Filed: 11/30/97	09:00 AM		
FCV Ratio: 10.00000000	100.00000000	FCV Imp Ratio: 1		Hearing: 01/20/97	02:00 PM		
Requested LPV: 8,000	89,000	Requested LPV Ratio: 99.00000000	Actual LPV Ratio: 100.00000000	Decision: 02/19/98	04:00 AM		
Requested Ass LPV: 7,920	89,000						

FIG. 10 Appeal Process

307

Parcel	Property Name	Notes
000-00-0002	First Sub Parcel	
000-00-0003	Second Sub Parcel	
000-00-0004	Third Sub Parcel	
000-00-0005	Fourth Sub Parcel	gbsdfgdf
000-00-0006	Pat's Property	Just a really big property.

Switch To Subparcel...

Parcel: --

FIG. 11 Subparcels

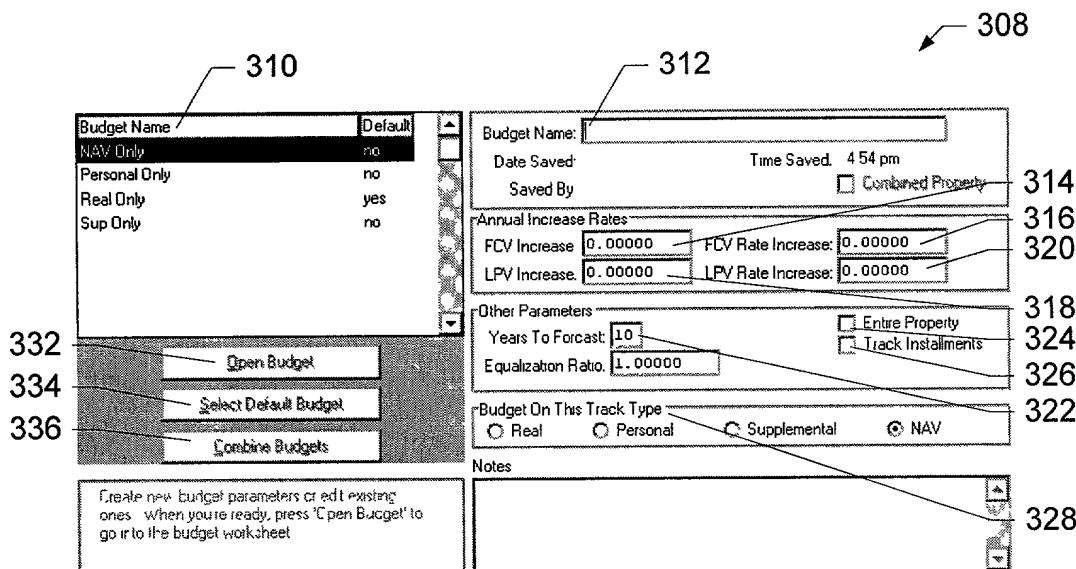


FIG. 12 Create Budgets

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Budget Worksheet for Scot Test

Property Year: 1997	State: AZ	Juris: Ct: Mar	Parcel: 222-22-222A																																																																																									
Prop Name: Parker Residence	Prop ID:																																																																																											
Budget Name: Scot Test		<input checked="" type="checkbox"/> Real	<input type="checkbox"/> Personal	<input type="checkbox"/> Supplemental																																																																																								
TV Increase: 0.02000	OV Increase: 0.00000	Years To Forecast: 10																																																																																										
TV Rate Increase: 0.02000	OV Rate Increase: 0.00000	<input type="checkbox"/> Combined Budget																																																																																										
<table border="1"> <thead> <tr> <th>Year</th> <th>TV</th> <th>TV Tax Rate</th> <th>TV Ratio</th> <th>OV</th> <th>OV Tax Rate</th> <th>OV Ratio</th> <th>Tax</th> </tr> </thead> <tbody> <tr><td>1997</td><td>100,000</td><td>0.030000</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>300.00</td></tr> <tr><td>1998</td><td>102,000</td><td>0.030600</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>1999</td><td>104,040</td><td>0.031212</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2000</td><td>106,121</td><td>0.031836</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2001</td><td>108,243</td><td>0.032473</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2002</td><td>110,408</td><td>0.033122</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2003</td><td>112,616</td><td>0.033785</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2004</td><td>114,863</td><td>0.034461</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2005</td><td>117,166</td><td>0.035150</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2006</td><td>119,509</td><td>0.035853</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> </tbody> </table>					Year	TV	TV Tax Rate	TV Ratio	OV	OV Tax Rate	OV Ratio	Tax	1997	100,000	0.030000	0.0000	200,000	0.000000	10.0000	300.00	1998	102,000	0.030600	0.0000	200,000	0.000000	10.0000	0.00	1999	104,040	0.031212	0.0000	200,000	0.000000	10.0000	0.00	2000	106,121	0.031836	0.0000	200,000	0.000000	10.0000	0.00	2001	108,243	0.032473	0.0000	200,000	0.000000	10.0000	0.00	2002	110,408	0.033122	0.0000	200,000	0.000000	10.0000	0.00	2003	112,616	0.033785	0.0000	200,000	0.000000	10.0000	0.00	2004	114,863	0.034461	0.0000	200,000	0.000000	10.0000	0.00	2005	117,166	0.035150	0.0000	200,000	0.000000	10.0000	0.00	2006	119,509	0.035853	0.0000	200,000	0.000000	10.0000	0.00
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Budget Status: This budget is saved.																																																																																												
<table border="1"> <thead> <tr> <th>Tax Year</th> <th>Installment</th> <th>Tax</th> <th>Date Due</th> <th>Total Payment</th> </tr> </thead> <tbody> <tr><td>1997</td><td>1</td><td>150.00</td><td>11/03/1997</td><td>150.00</td></tr> <tr><td>1997</td><td>2</td><td>150.00</td><td>05/01/1998</td><td>300.00</td></tr> </tbody> </table>				Tax Year	Installment	Tax	Date Due	Total Payment	1997	1	150.00	11/03/1997	150.00	1997	2	150.00	05/01/1998	300.00	Show: <input checked="" type="radio"/> Tax From 1997 <input type="radio"/> Instalments Due in 1997 Save Budget Recalculate Budget Restore to Last Saved Start Over Exit																																																																									
Tax Year	Installment	Tax	Date Due	Total Payment																																																																																								
1997	1	150.00	11/03/1997	150.00																																																																																								
1997	2	150.00	05/01/1998	300.00																																																																																								

FIG. 13 Budget Worksheet

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Required It Date	Payee	Asmt Type	Track ID	Tax Bill#	Total Due	Disc Amount	Total Payments	Payment Date
10/01/97	AZ-MARICOPA-T/PROP	PTP		PP-33163123165165	25,000.00	0.00	25,000.00	07/01/97
11/01/97	AZ-MARICOPA-T/REAL			N25	52,964.80	0.00	52,964.80	07/01/97
2/05/01/98	AZ-MARICOPA-T/REAL			N25	52,964.80	0.00	52,964.80	05/01/98

Asmt Types <input checked="" type="radio"/> Real <input type="radio"/> Supplemental <input type="radio"/> Personal Property <input type="radio"/> NAV	Track ID <input type="text" value="1"/>	Chrg Less Disc <input type="text" value="130,929.60"/>																		
Installment <input type="text" value="0"/>	<input type="checkbox"/> Estimate?	Payments <input type="text" value="130,929.60"/>																		
Payee: <input type="text" value="AZ-MARICOPA-T"/>	Check Num <input type="text" value="0"/>	Balance to Pay <input type="text" value="0.00"/>																		
Tax Bill# <input type="text" value="?"/>	Chk Req # <input type="text" value="0"/>	Unpaid Amt <input type="text" value="0.00"/>																		
<table border="1"> <tr> <td>Charges <input type="text" value=""/></td> <td>Discount <input type="text" value=""/></td> <td>Payments <input type="text" value=""/></td> </tr> <tr> <td>Date <input type="text" value=""/></td> <td></td> <td></td> </tr> <tr> <td>Principal <input type="text" value="0.00"/></td> <td><input type="text" value="0.00"/></td> <td><input type="text" value="0.00"/></td> </tr> <tr> <td>Penalty <input type="text" value="0.00"/></td> <td></td> <td><input type="text" value="0.00"/></td> </tr> <tr> <td>Interest <input type="text" value="0.00"/></td> <td></td> <td><input type="text" value="0.00"/></td> </tr> <tr> <td>Notes <input type="text" value=""/></td> <td>Other <input type="text" value=""/></td> <td><input type="text" value="0.00"/></td> </tr> </table>			Charges <input type="text" value=""/>	Discount <input type="text" value=""/>	Payments <input type="text" value=""/>	Date <input type="text" value=""/>			Principal <input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Penalty <input type="text" value="0.00"/>		<input type="text" value="0.00"/>	Interest <input type="text" value="0.00"/>		<input type="text" value="0.00"/>	Notes <input type="text" value=""/>	Other <input type="text" value=""/>	<input type="text" value="0.00"/>
Charges <input type="text" value=""/>	Discount <input type="text" value=""/>	Payments <input type="text" value=""/>																		
Date <input type="text" value=""/>																				
Principal <input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>																		
Penalty <input type="text" value="0.00"/>		<input type="text" value="0.00"/>																		
Interest <input type="text" value="0.00"/>		<input type="text" value="0.00"/>																		
Notes <input type="text" value=""/>	Other <input type="text" value=""/>	<input type="text" value="0.00"/>																		
Status: Released <input type="checkbox"/> Auto Add Entry Date: <input type="text" value=""/> Mailed Date: <input type="text" value=""/>																				

FIG. 14 Accounts Payable

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**Auto Add**

<b>A/P Entries</b>	<b>OK</b>
<input checked="" type="checkbox"/> Divide into Installments <input checked="" type="checkbox"/> Include Discounts <input checked="" type="checkbox"/> Include Payments <input type="checkbox"/> Skip Tracks Already Brought Over	<b>Cancel</b>
<b>Track Types</b>	
<input checked="" type="checkbox"/> Real <input type="checkbox"/> Supplemental <input checked="" type="checkbox"/> Personal <input type="checkbox"/> NAV	
This procedure will automatically create A/P records. Payees must be setup for the jurisdiction. Also, the installment rules must be set up for this jurisdiction.	
This jurisdiction is getting its rules from: Arizona (Real) Arizona (Personal)	

FIG. 15 Auto Add

Client ID	Name	Active?
2802	HUNTER'S GLEN APARTMENTS	Y
2803	LIBERTY LLP	Y
2804	TRUST UNION REAL ESTATE EQUITY	Y
2805	RGM SHOFFET	Y
2806	BANK ONE CHICAGO	Y
3040	3040 North 44th Street Phoenix	Y
777 INVE	777 Investments LLC	Y
9538	Ashley Eleanor Merritt	Y

Client ID: 1001

366

354

368

356

358

360

362

364

Client ID	Client Name	Client #	Billing #
9998	Ashley Eleanor Merritt	9998	9998
Type	SubType	Responsible Attorney	
Client	Current	RJT	Rich J. Truly
Address	8000 N. Barney Lane		
Mailing Address	P O Box 7		
City	Phoenix	State	AZ
E-Mail Address	ashley@naccarati.com		
Phone	602-900-9998	Extention	
Fax	602-900-9997	Region	
Parent ID	9999	Active Y	
Referral ID	Patti Naccarati		
Referring Individual			
Referral Terms			

FIG. 16 Address Information

370

372 454 452 456 490

371

Contact Maintenance

Indy ID:   
Jackie D. Quinn

Individual ID:  Contact Type:

Full Name:  Title:   
First Name:  Last Name:  Salutation:

Phone:   Ext:

Address is Same as Client

Address 1:   
Address 2:   
Address 3:   
City:  State:  ZIP:

E-Mail:

Buttons:

FIG. 17 Contacts

374

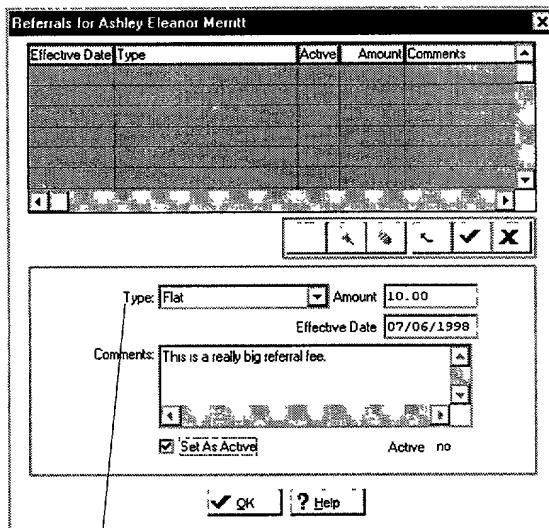


FIG. 18 Referral

376

Individual Id	Name	Title	Number
MKP	Mixed Laundry Peopoki	Attorney	102
MSK	Miyas Franky	Attorney	102
PN	Patti Naccarati	Attorney	999
RDN	Richard D. Nearhood	Attorney	1
RDN1	R. Nearhood	Attorney	1
RJL	Rich J. Truly	Attorney	103
WIS	W. I. Stein	Attorney	100
WS	W. I. Stein Jr.	Attorney	101

Individual Id	AEM	Title	Little Lawyer
Name	Ashley Eleanor Merritt		
Number	998	Attorney	N

FIG. 19 Working Professionals

391

390

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382 384

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414

422

FIG. 20 Calendar

262 424

408

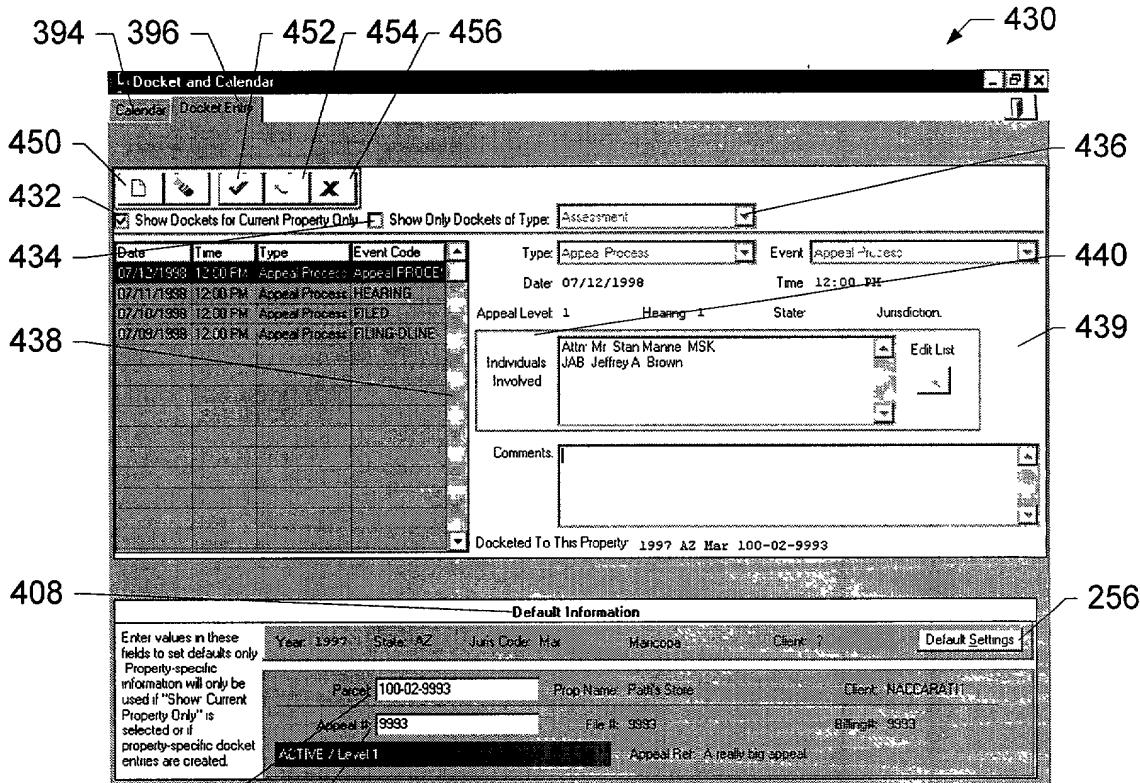


FIG. 21 Docket Entry

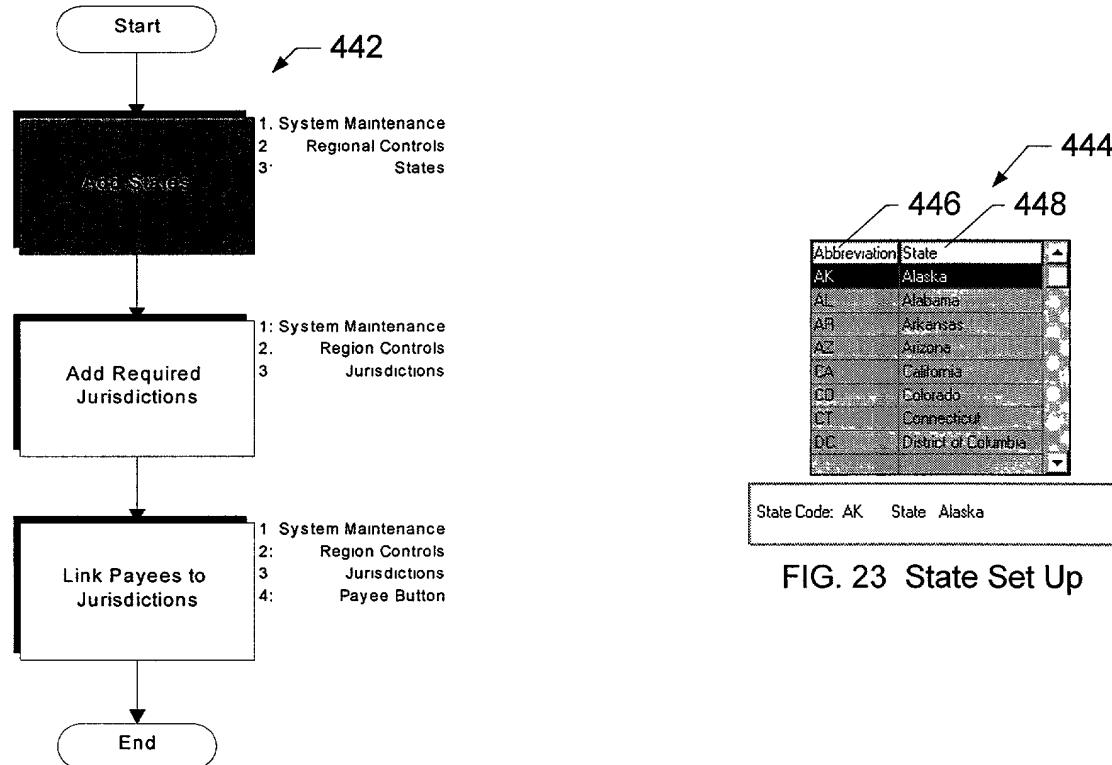


FIG. 22 Creating States and Jurisdictions

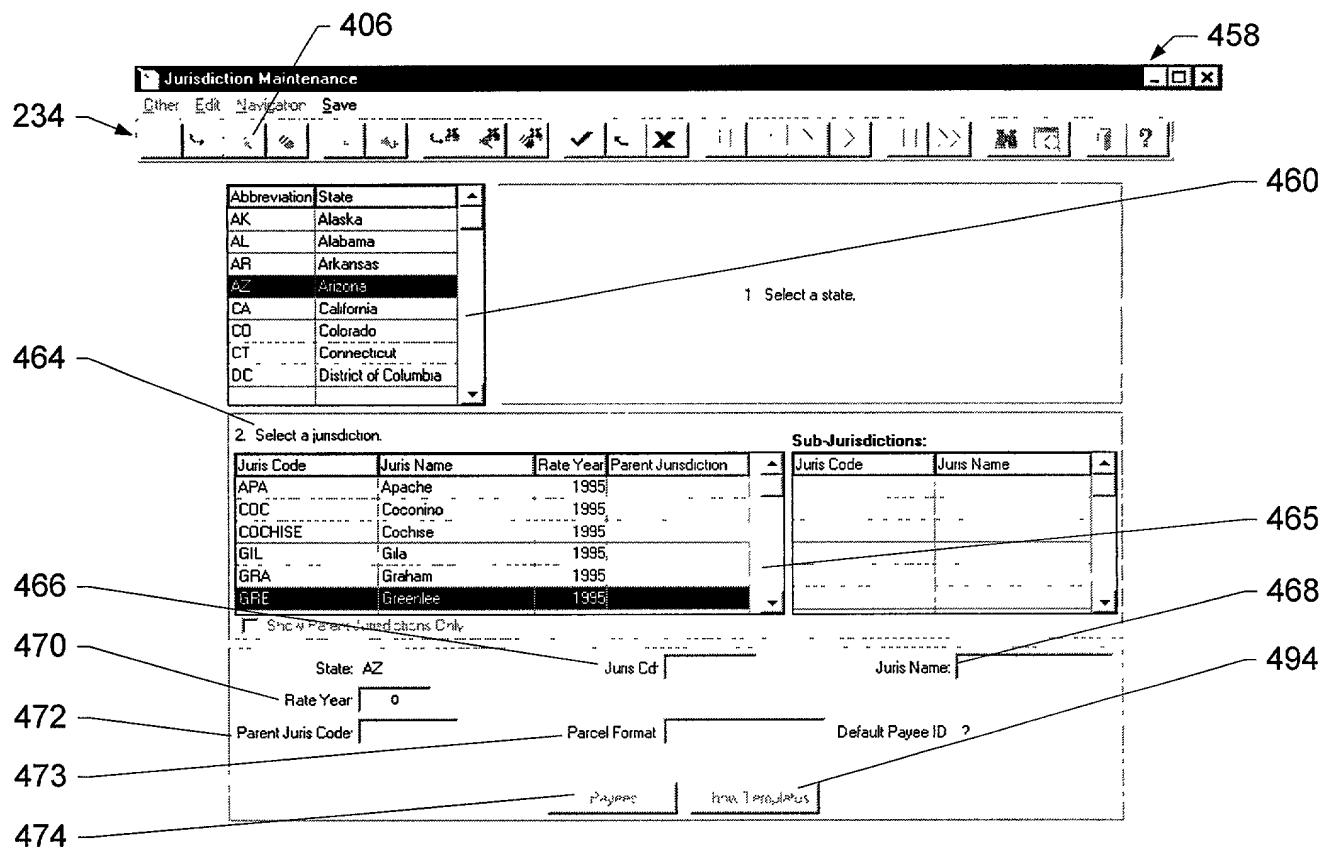


FIG. 24 Jurisdiction Set Up

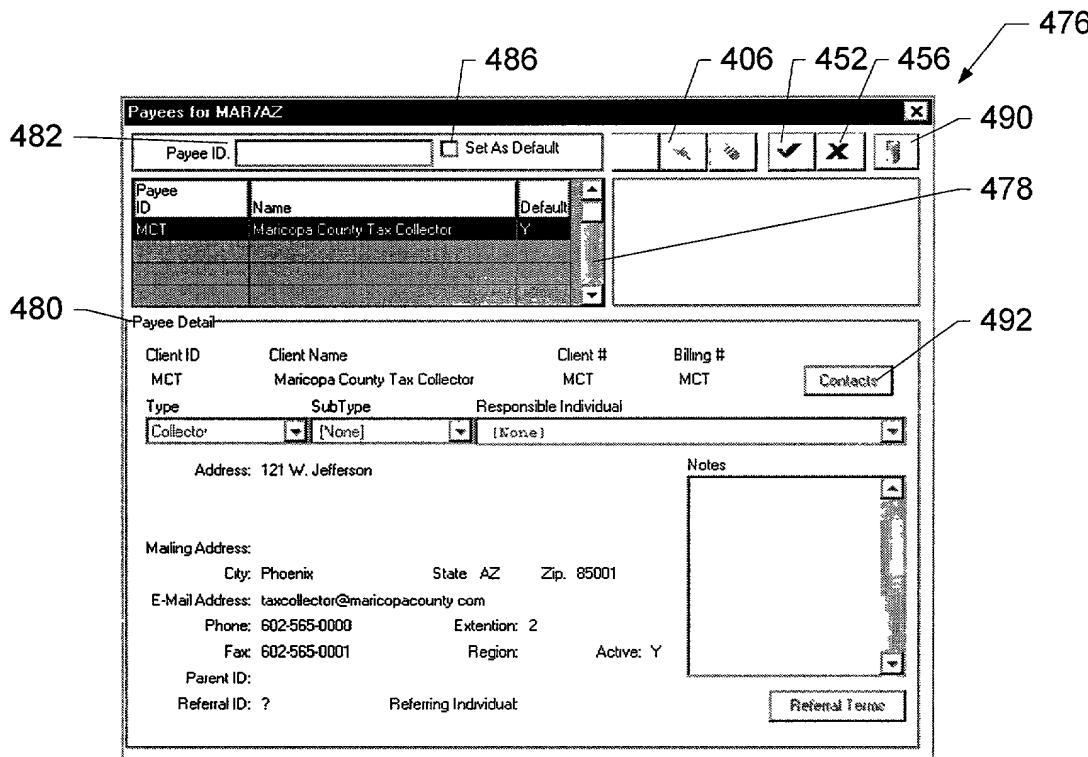


FIG. 25 Jurisdiction Payee

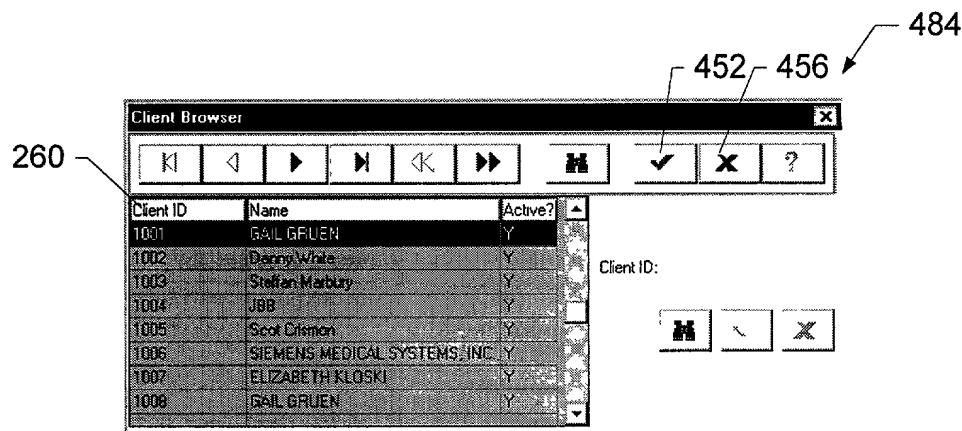


FIG. 26 Client Browser

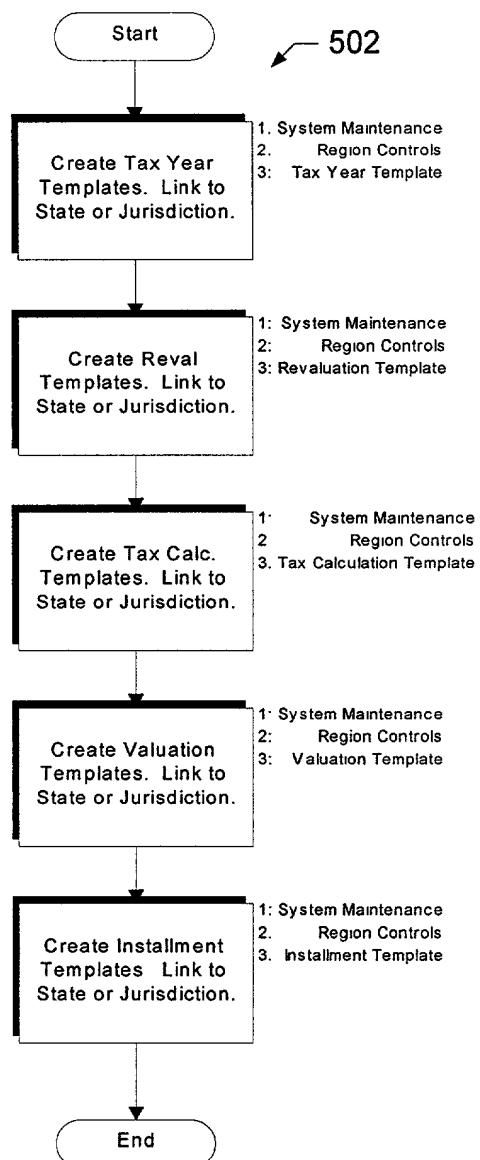


FIG. 27 Templates

<p><b>Name</b> Arizona Texas</p> <p><b>Links</b></p>	<p><b>Name:</b> <input type="text" value="Arizona"/></p> <p><b>Start Year</b></p> <p>Start Month: <input type="text" value="1"/> Start Day: <input type="text" value="1"/></p> <p><b>Year:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Two Years Prior</li> <li><input type="radio"/> Previous Year</li> <li><input checked="" type="radio"/> Current Year</li> <li><input type="radio"/> Next Year</li> <li><input type="radio"/> Two Years From</li> </ul> <p>If day falls on holiday or weekend then move the day to the:</p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Prior Workday</li> <li><input type="radio"/> Next Workday</li> <li><input type="radio"/> Ignore</li> </ul>	<p><b>Next Year</b></p> <p>Start Month: <input type="text" value="12"/> Start Day: <input type="text" value="31"/></p> <p><b>Year:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Two Years Prior</li> <li><input type="radio"/> Previous Year</li> <li><input checked="" type="radio"/> Current Year</li> <li><input type="radio"/> Next Year</li> <li><input type="radio"/> Two Years From</li> </ul> <p>If day falls on holiday or weekend then move the day to the:</p> <ul style="list-style-type: none"> <li><input type="radio"/> Prior Workday</li> <li><input type="radio"/> Next Workday</li> <li><input type="radio"/> Ignore</li> </ul>
<p><b>512</b></p> <p><b>509</b></p> <p><b>514</b></p>	<p><b>510</b></p> <p><b>515</b></p> <p><b>506</b></p> <p><b>505</b></p>	<p><b>517</b></p> <p><b>508</b></p> <p><b>511</b></p> <p><b>513</b></p>

### FIG. 28 - TAX YEAR TEMPLATE

FIG. 29 Tax Year Template Link To

FIG. 30 Templates by Year

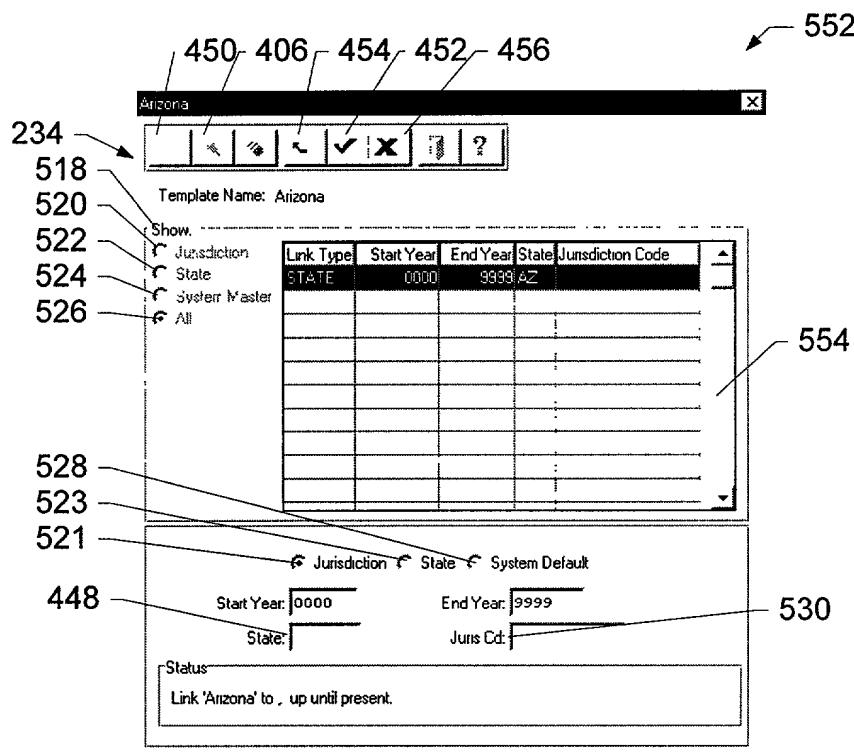
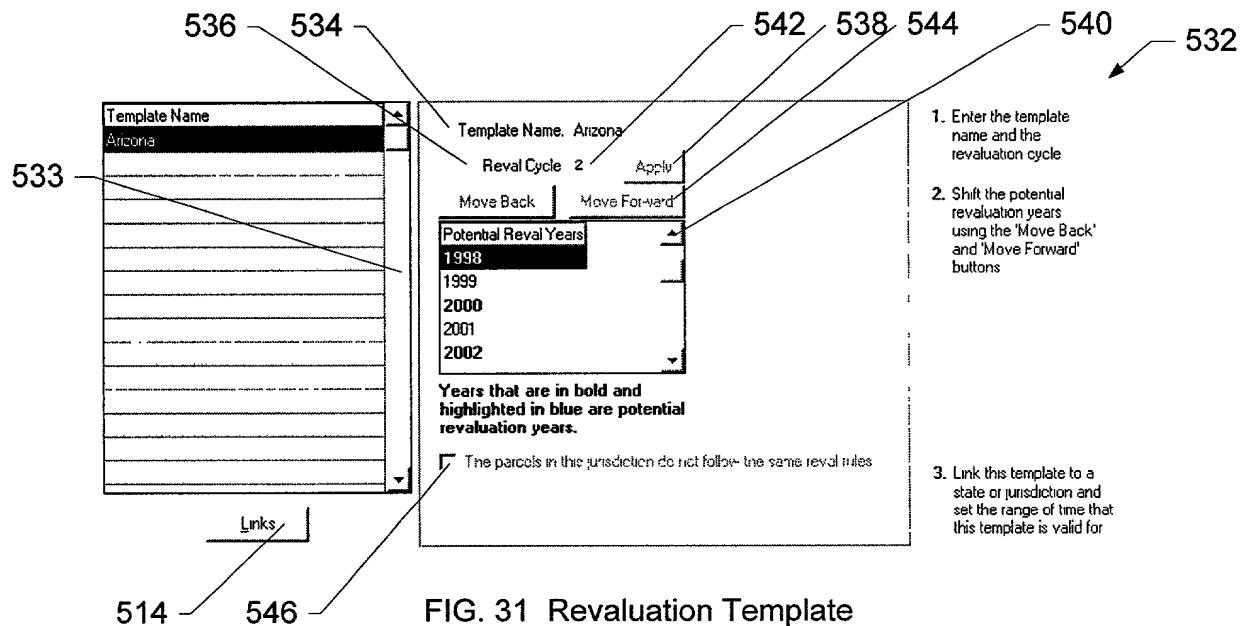


FIG. 32 Template Link To

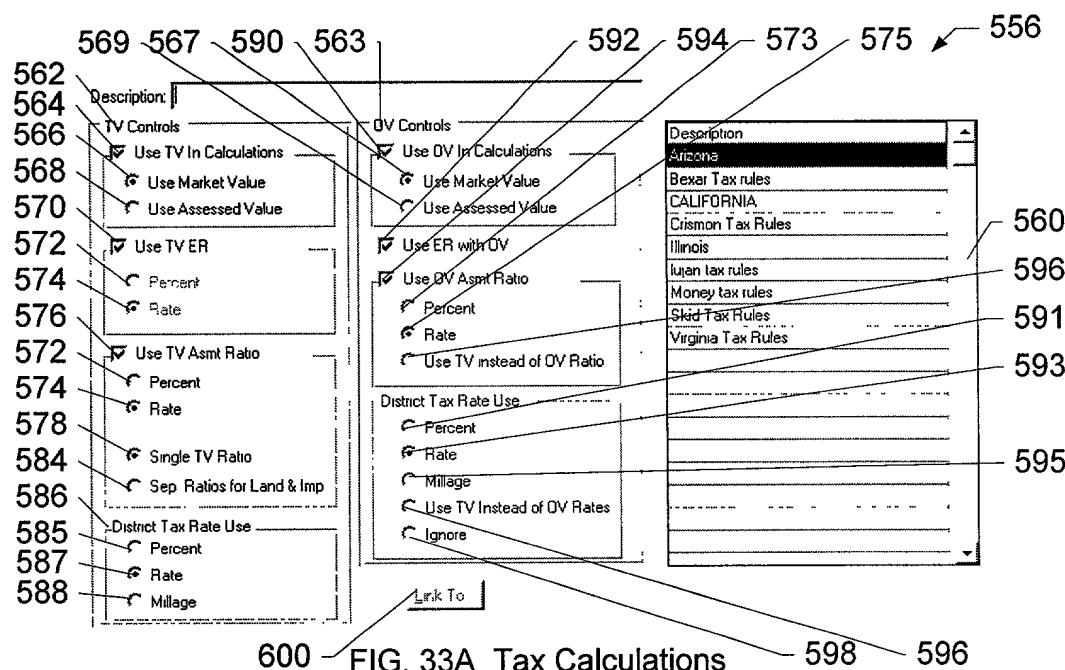


FIG. 33A Tax Calculations

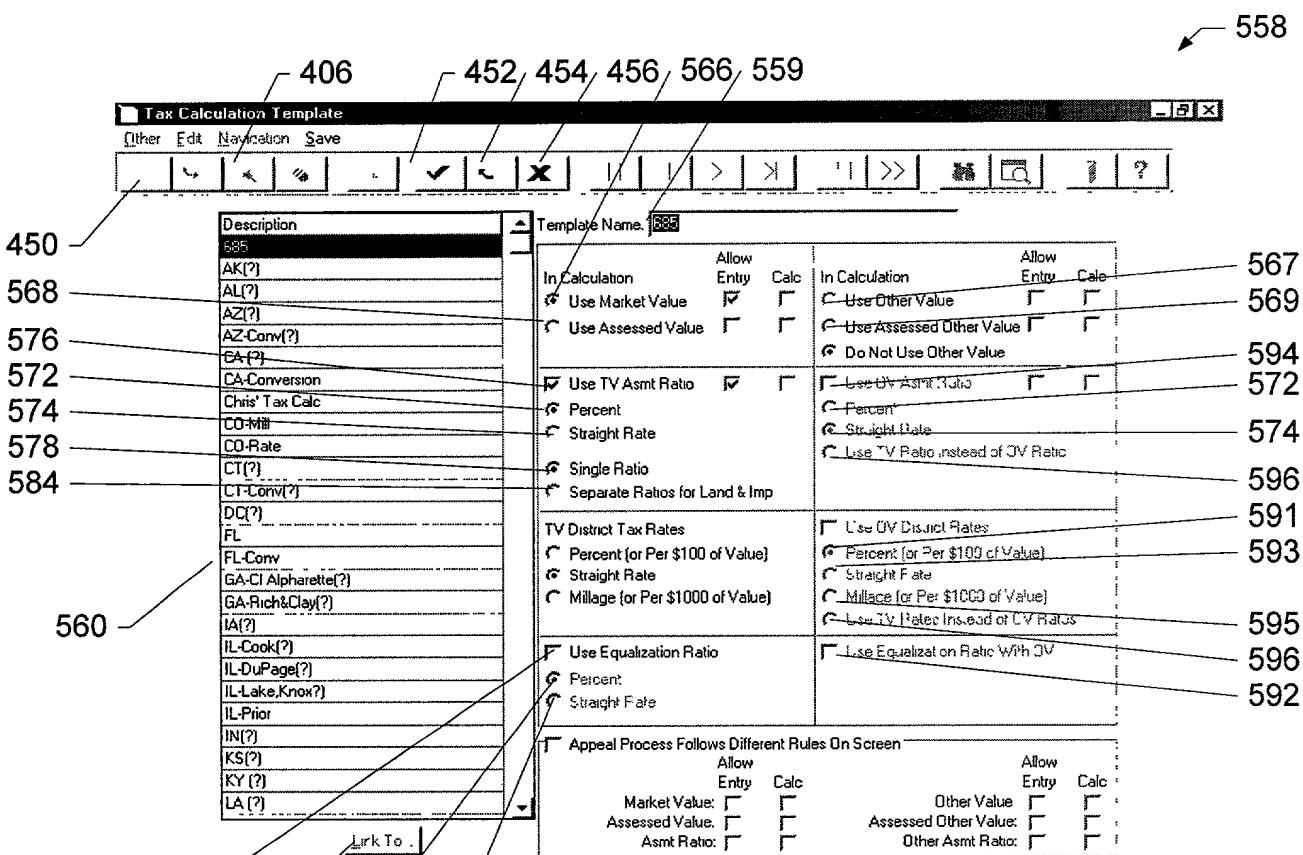


FIG. 33B Tax Calculations

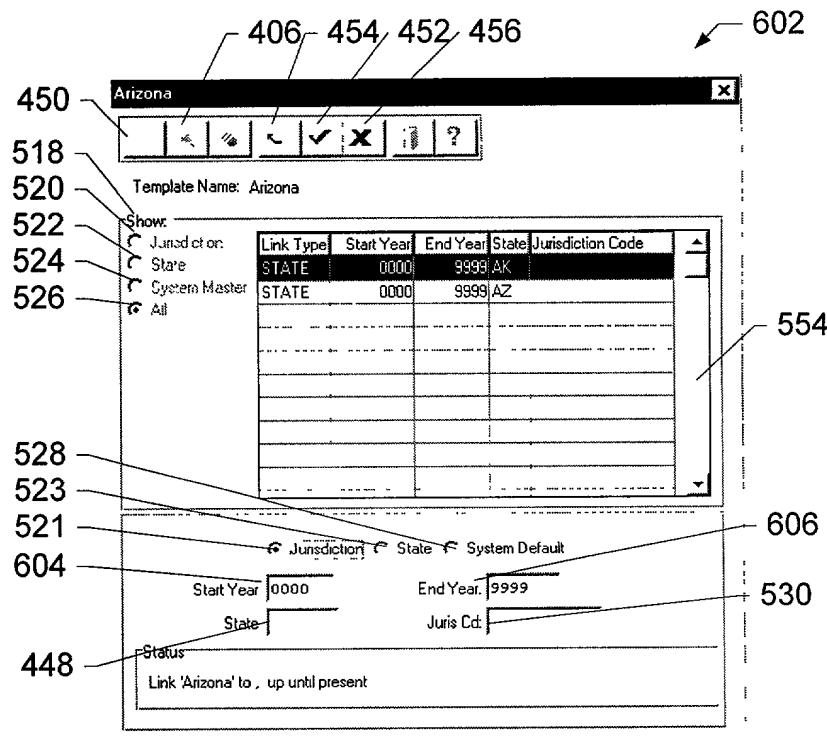


FIG. 34 Tax Calculation Link To

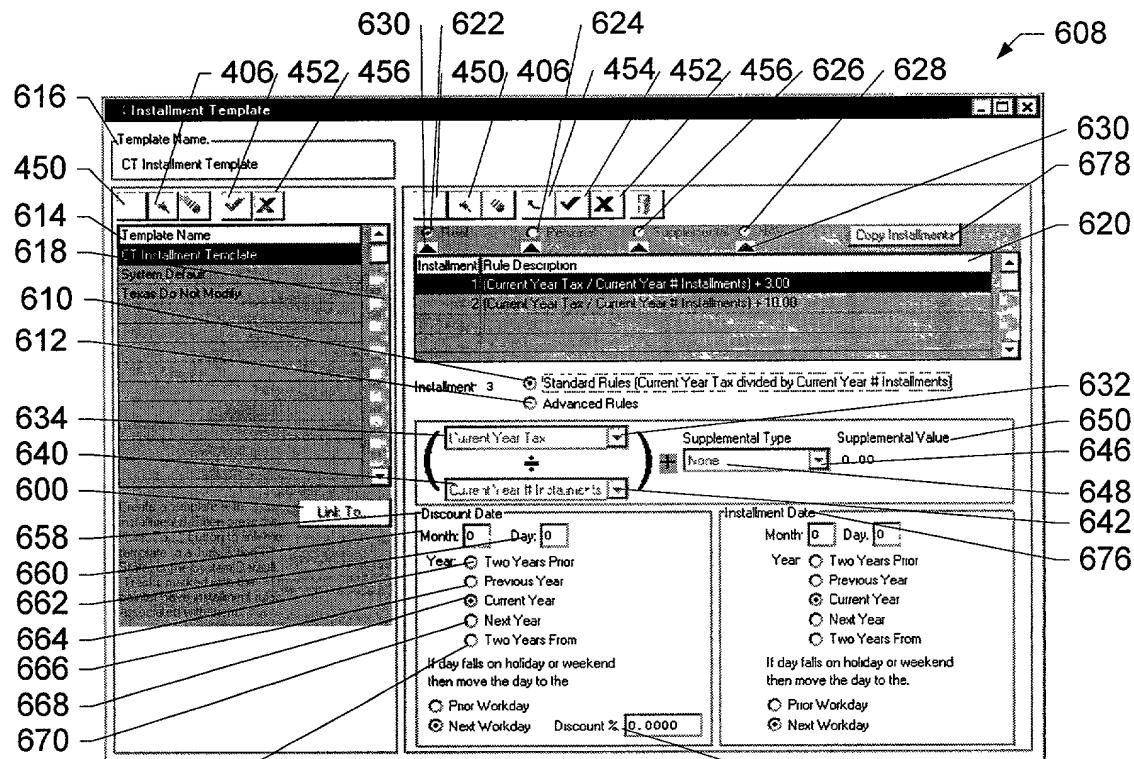


FIG. 35 Installment Template

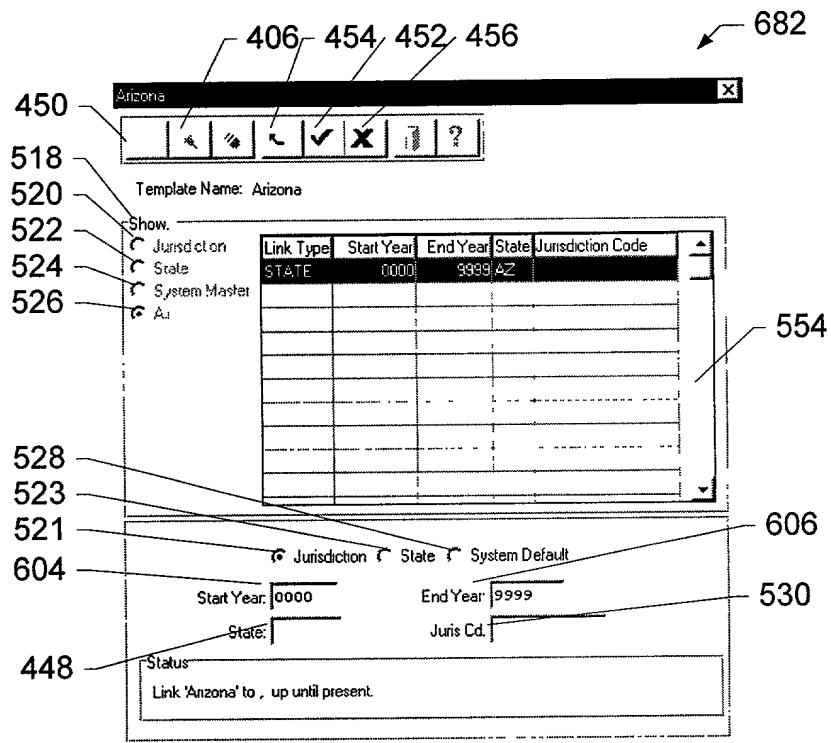


FIG. 36 Installment Templates Link To

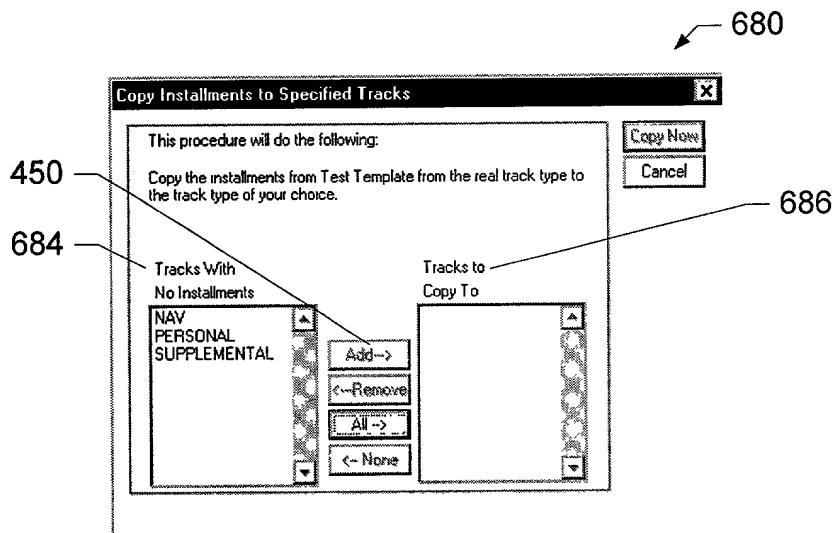
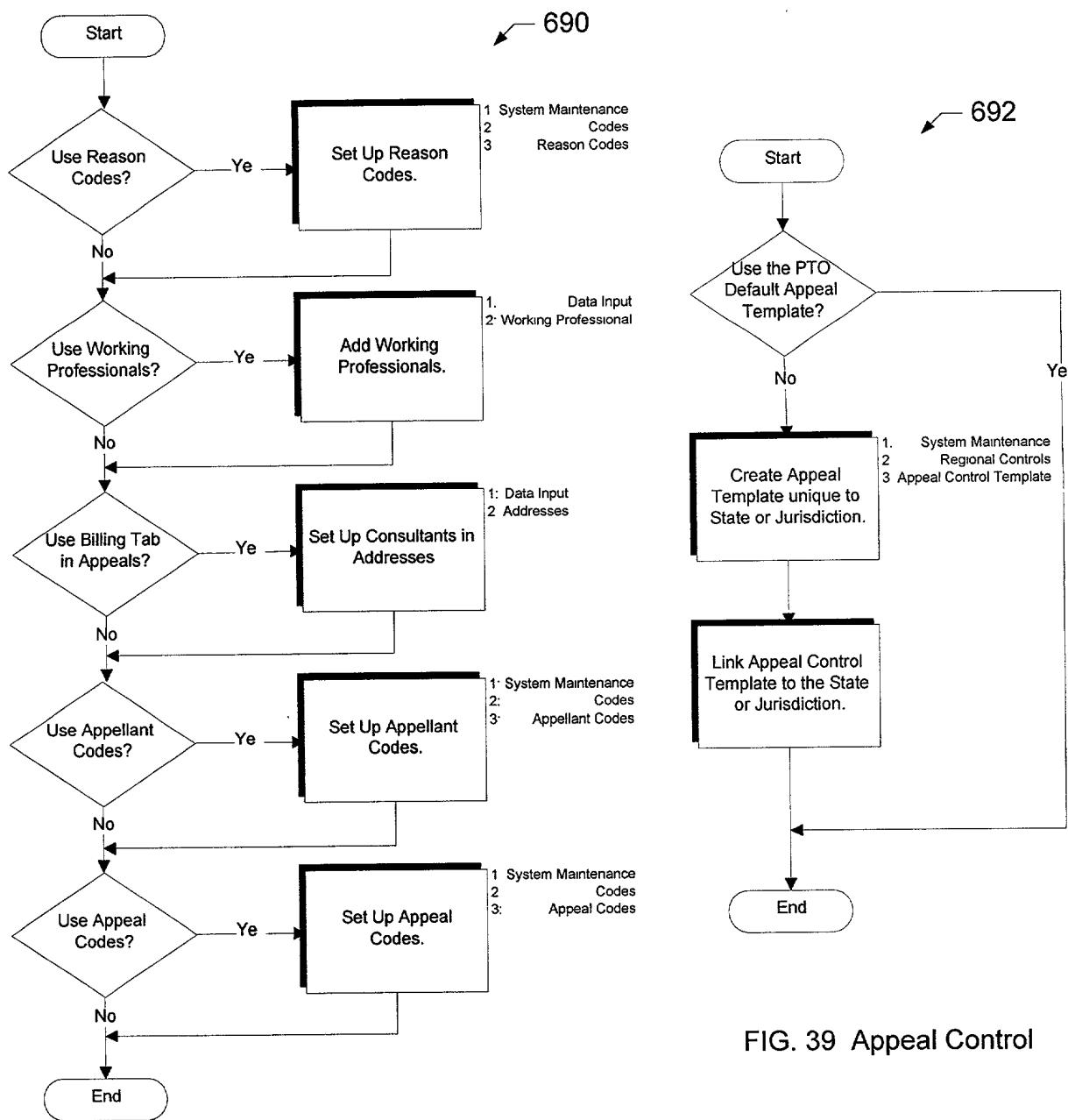


FIG. 37 Copy Installments Dialog Box



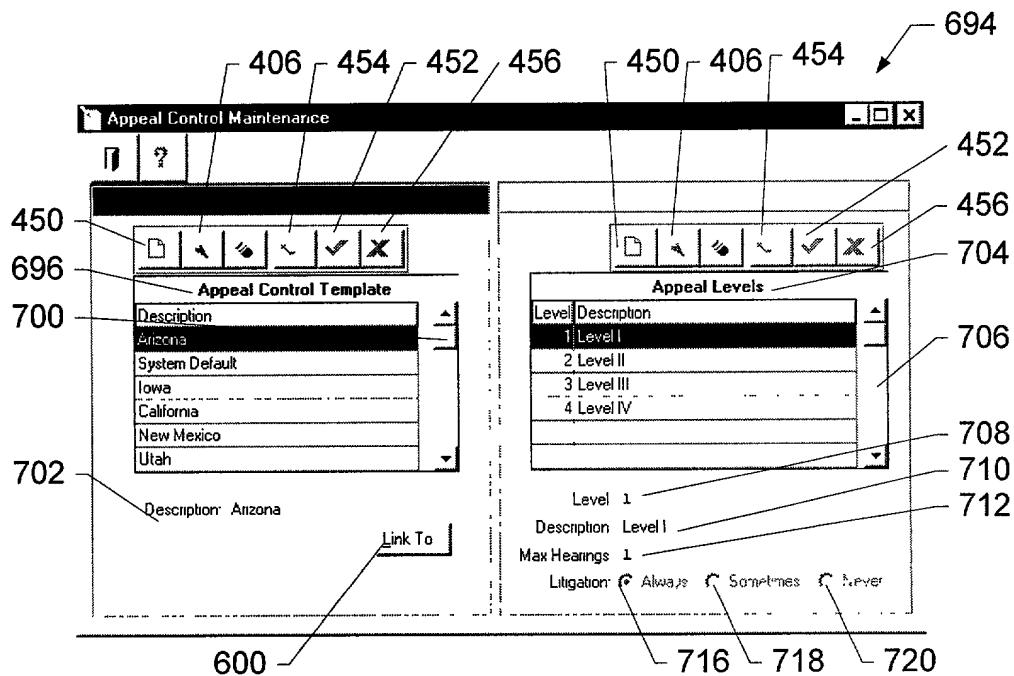


FIG. 40 Appeal Control

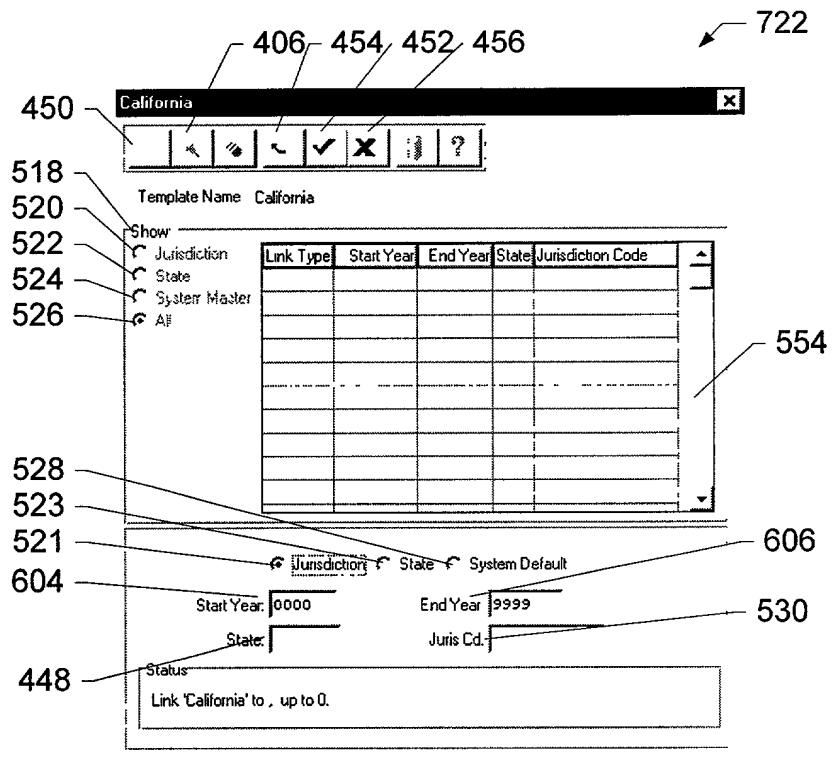


FIG. 41 Appeal Control Link

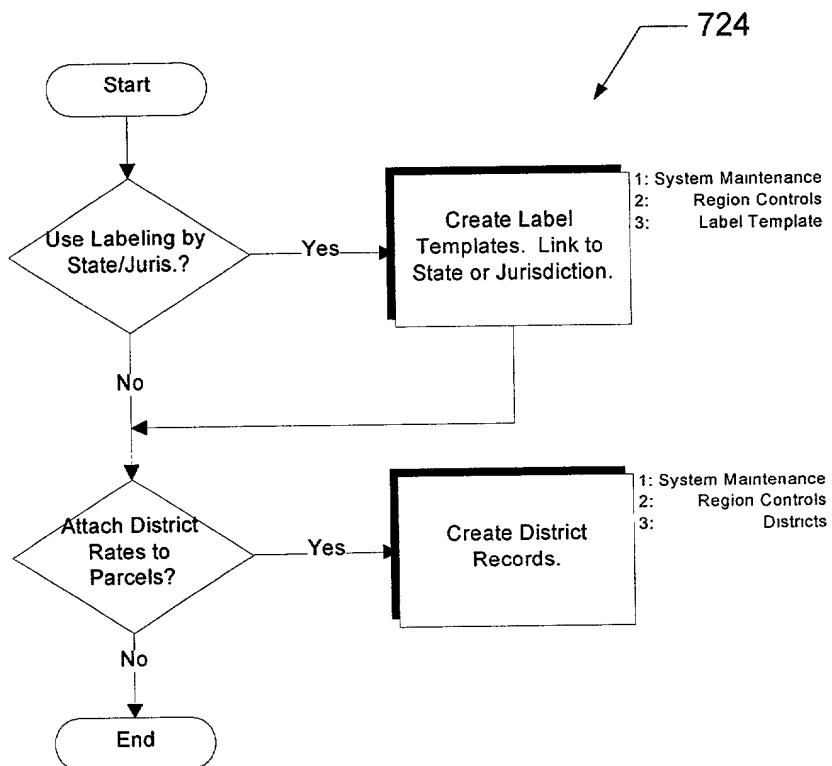


FIG. 42 Dynamic Labeling and Districts

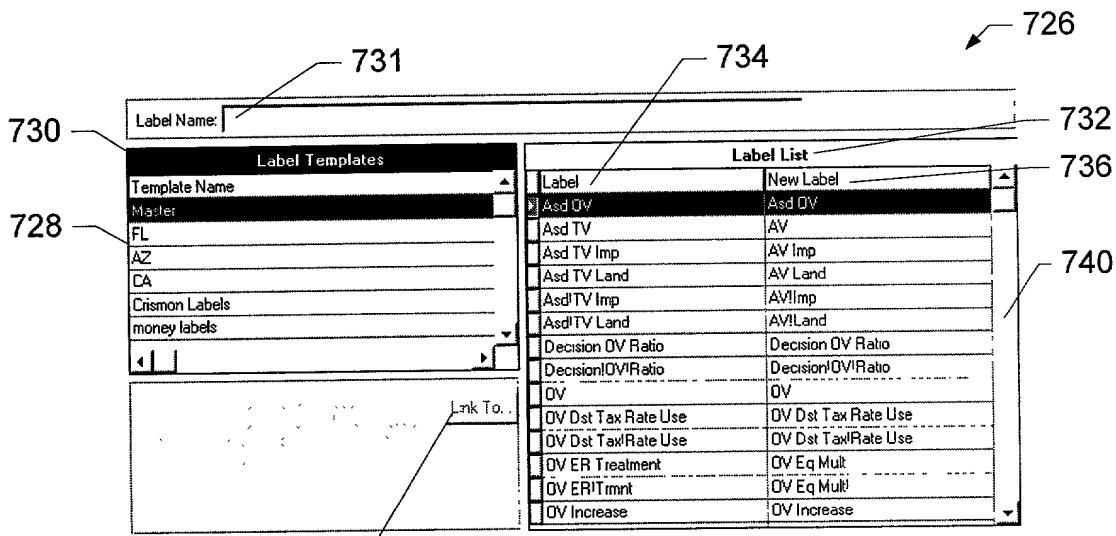


FIG. 43A Label Template

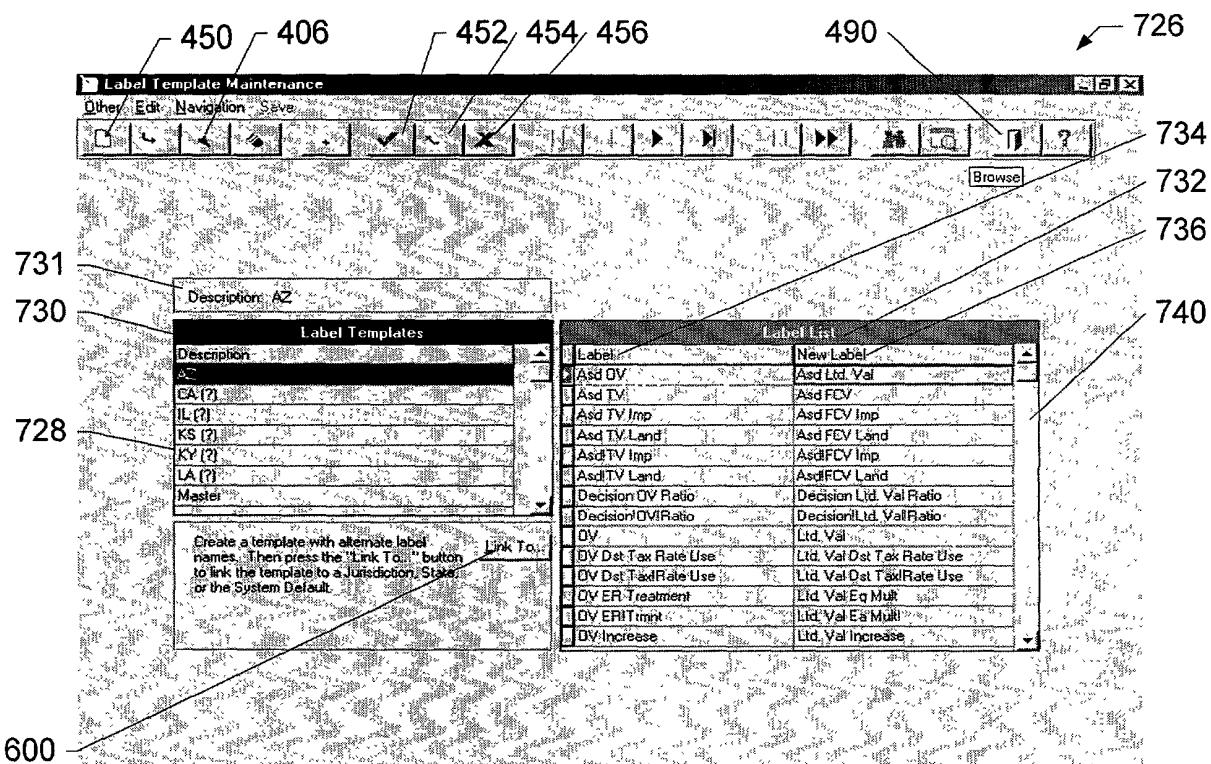


FIG. 43B Label Template

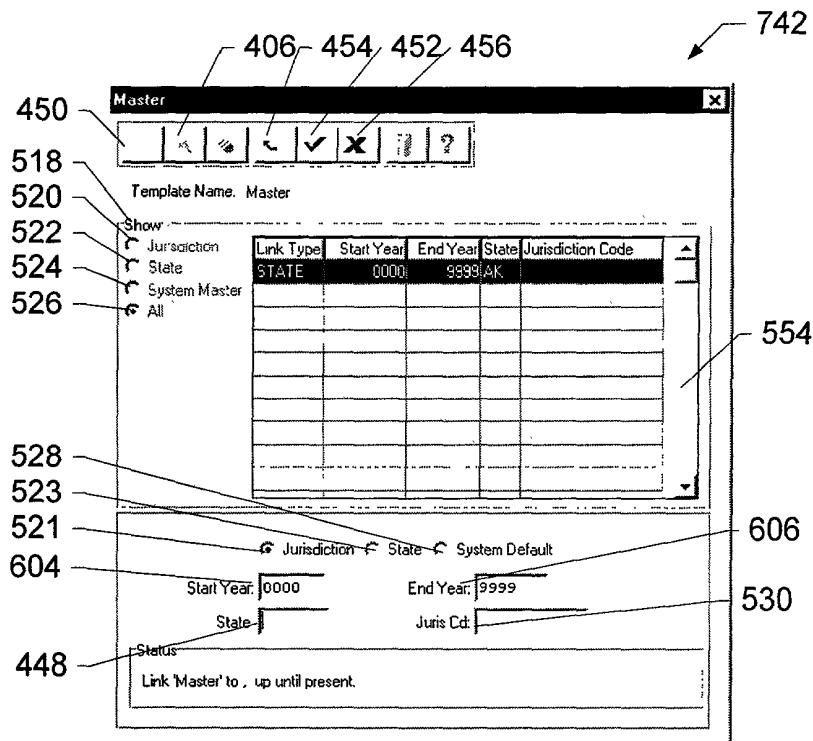


FIG. 44 Label Template Link To

Dist Code	Classification	TV Rate	OV Rate
011300	5	0.049993	0131873
011301	5	0.049993	0131873
011303	7	0.049993	0131873
021300	5	0.033276	0.095237
031300	5	0.037463	0105936
031600	8	0.037028	0.102171
031602		0.037028	0102171
051300		0.047124	0143199
061300		0.038675	0.097567

Dist Code:  Class:

Dist Code:  Description:

Class:

TV Rate:

OV Rate:

Special District

Type:

Use in Update?:  Y

FIG. 45 - District Set Up